Anita Mosesian (CONS/E)

Case No. 07CEPR00752

Atty Bagdasarian, Gary G. (for Elaine J. Mosesian – Granddaughter – Former Conservator – Petitioner)
Atty Kruthers, Heather H. (for Public Guardian – Current Conservator)

First Amended First Account and Report of Conservator; Petition for Attorney's Fees and Costs Reimbursement; and for Discharge as Conservator

Age	e: 94		GARY BAGDASARIAN, attorney for former Conservator,	NEEDS/PROBLEMS/COMMENTS:
DO	B: 7-13-17		Elaine J. Mosesian, is Petitioner.	CONTINUED FROM 05/10/12
			ELAINE J. MOSESIAN, granddaughter was appointed as	Minute Order from 05/10/12 states: The Court grants the First Amended
			conservator of the estate on 12-18-07 with bond set at \$40,000.00 and her resignation was accepted on	Account and reserves the issue of
Coi	nt. from 051012		03/09/11.	attorney's fees. Counsel is directed
	Aff.Sub.Wit.			to submit a declaration in letter form regarding the attorney's fees.
>	Verified		The Public Guardian was appointed as successor conservator on 03/09/11 and Letters were issued on	Note
	Inventory		03/28/11.	Note: The Amended Account states that
	PTC			\$3,402.00 was paid to attorney
	Not.Cred.		The First Amended First Account & Report of Conservator and Petition for Attorney's Fees and Costs	Bagdasarian for work he performed in connection with the conservatee's
>	Notice of Hrg		Reimbursement and for discharge as Conservator was	pre-existing trust. The work was not
>	Aff.Mail	w/	heard on 05/10/12.	related to the conservatorship and should have been paid from funds of
	Aff.Pub.		The Court approved the First Amended First Account &	the trust; however, the conservator
	Sp.Ntc.		Report of Conservator on 05/10/12 and continued the	wrongly paid the fees from the
	Pers.Serv.		issue of Attorney's Fees and Cost Reimbursement to	conservatorship estate. Attorney Bagdasarian has reduced his fee
	Conf. Screen		06/07/12.	request by \$3,402.00 to reimburse
	Letters		Attorney's fees and costs requested in the Petition were	the conservatorship for the fees that were wrongly paid from the
	Duties/Supp		as follows: - \$14,275.50 (per itemization for	conservatorship.
	Objections		establishment of the conservatorship, preparation of accounting of conservator, less \$3,402.00 for fees that	
	Video		were previously paid by the conservatorship estate)	
	Receipt			
✓	CI Report		Declaration of Gary G. Bagdasarian filed 05/18/12 states: all of the time in question in connection with the	
~	2620		request for appointment of the Conservator was	
>	Order		appropriate and the sum of \$6,645.00 for his work	
	Aff. Posting		regarding the appointment of the Conservator is	Reviewed by: JF
	Status Rpt		appropriate. Further, Mr. Bagdasarian states that he spent 45.10 hours in connection with completing the	Reviewed on: 06/04/12
	UCCJEA		accounting of the former Conservator because of lack	Updates:
	Citation		of cooperation with the former Conservator in providing	Recommendation:
	FTB Notice		the necessary documentation. Nine court appearances were required and no request for	File 1 - Mosesian
			compensation was made for preparation for and	
			attendance at the hearing on 05/10/12 no for the	
			preparation of this declaration regarding his fees. Mr.	
			Bagdasarian further states that although his office does not use the service of a paralegal, had a paralegal	
			been used, it appears that a paralegal could have	
			been used for 10.1 hours. He believes that if a	
			paralegal had been used for these 10.1 hours, it would	
			have resulted in savings of \$1,010.00. Consequently, he	
			is reducing his fees relating to the accounting of Conservator from \$11,032.50 to \$10,022.50. <i>Taking in to</i>	
			account the \$3,402.00 credit for fees that were	
			previously paid by the conservatorship estate, the fees	
			now requested are \$13,265.50.	

Atty

Fanucchi, Edward L. (for Olivia Rendon – Administrator – Petitioner)

(1) First and Final Account and Report of Personal Representative, (2) Petition for Settlement, for Allowance of Statutory Commissions and Extraordinary Fees, (3) Attorneys' Fees for Ordinary and Extraordinary Services, Costs and for (4) Final Distribution [Prob. C. 11640 & CRC 7.702-7.705]

DOD: 4-26-08			OLIVIA RENDON , Administrator with full IAEA with bond of \$135,000.00, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
			Account period: 4-26-08 through 1-26-12	Petitioner requests distribution to Angelica Rivera, who is a conserved
			Accounting: \$98,995.41	adult (Fresno Superior Court Case
Con	t. from 042612		Beginning POH: \$95,000.00	#0611237.
	Aff.Sub.Wit.		Ending POH: \$74,766.64	The Court may require clarification
>	Verified		Administrator (Statutory): \$3,679.82	whether distribution is to be <u>directly</u>
>	Inventory		Administrator (Extraordinary): \$1,000.00	to Angelica Rivera under Probate Code §3611(i) <u>or to her conservator</u> ,
>	PTC		(sale of the residence, per local rule)	Ida Perez, under Probate Code
>	Not.Cred.		Attorney (Statutory): \$3,679.82	§3611(b) (blocked account) or (d)
>	Notice of			other conditions, if any.
	Hrg		Attorney (Extraordinary): \$1,000.00 (sale of the residence, per local rule)	
>	Aff.Mail	W	,	
	Aff.Pub.		Costs: \$834.50	
	Sp.Ntc.		(filing fees, certified letters, Probate Referee)	
	Pers.Serv.		Petitioner requests distribution pursuant to	
	Conf. Screen		intestate succession, including	
~	Letters	10-16-08	reimbursements to certain heirs for costs of administration advanced, and equalization	
	Duties/Supp		for personal property (furniture, etc.)	
	Objections		distributed, as follows:	
	Video		Olivia Rendon: \$22,424.38	
	Receipt		(10% + costs + equalization)	
	CI Report		Graciela Llamas: \$5,329.03	
>	9202		(10% + equalization)	
~	Order		lda Perez: \$5,329.03	
	Aff. Posting		(10% + equalization)	Reviewed by: skc
	Status Rpt		Gabriel Albarran-Gurrusquita: \$5,329.03	Reviewed on: 6-4-12
	UCCJEA		(10% + equalization)	Updates:
	Citation		Elida Rivera: \$5,329.03 (10% + equalization)	Recommendation:
>	FTB Notice		Leticia Rodriquez: \$4,953.88 (10%)	File 2 - Rivera
			Federico Rivera: \$453.83	
			(10% - closing costs)	
			Ruperto Rivera, Jr.: \$5,404.00	
			(10% + costs advanced)	
			Aracelia Elizarraraz: \$5,066.41	
			(10% + costs advanced)	
			Angelica Rivera: \$4,953.88 (10%)	

3 Fermin Garcia (CONS/PE)

Case No. 11CEPR00072

Atty Kruthers, Heather H. (for Public Guardian – Conservator/Petitioner)

Atty LeVan, Nancy J. (Court Appointed for Conservatee)

Petition for Exclusive Authority to Give Consent for Medical Treatment

Age: DOB:	91 : 08/20/20		PUBLIC GUARDIAN , Conservator of the Person and Estate with Medical Consent powers, is Petitioner and requests Dementia Powers to	NEEDS/PROBLEMS/COMMENTS:
			administer dementia medications and for placement in a secured perimeter facility.	
Cont	t. from			
	Aff.Sub.Wit.		PUBLIC GUARDIAN was appointed as	
√ \	Verified		Conservator of the Person and Estate with Medical Consent Powers on 03/15/11 and	
ı	Inventory		Letters were issued on 03/29/11.	
_	PTC		Letters were issued off 03/2//11.	
ı	Not.Cred.			
√ 1	Notice of		Court Investigator Samantha Henson filed a	
1	Hrg		report on 05/31/12.	
✓ <i>I</i>	Aff.Mail	w/o		
	Aff.Pub.			
9	Sp.Ntc.			
✓ F	Pers.Serv.			
	Conf.			
\vdash	Screen			
	Letters			
_	Duties/Supp			
	Objections			
	Video			
	Receipt			
==	CI Report 9202			
	9202 Order			
	Aff. Posting			Reviewed by: JF
\vdash	Status Rpt			Reviewed on: 06/05/12
	UCCJEA			Updates:
	Citation			Recommendation:
F	FTB Notice			File 3 - Garcia

4 Wahnie Alec Sylvester (Estate)

Case No. 11CEPR00350

- Atty Forbes, Donald R.; Lucich, Jr., Nicholas L., of Helon & Manfredo (for Petitioner Sally Mincks, Executor)
- Atty Salazar, Steven F., sole practitioner (for Respondents Miles Humphreys and SDS, Inc., dba Sierra Towing)

Petition to Establish Estate's Claim of Ownership to Property, for Order Directing its Transfer to Estate and for Double Damages for Wrongful Taking of Estate Property (Property Code 850(a)(20 and 859)

DC	D: 3/14/2011		SALLY MINCKS, Executor appointed on	NEEDS/PROBLEMS/COMMENTS:
	<i>D</i> . 0/ 14/2011		6/7/2011, is Petitioner.	NEEDS, I ROBELMO, COMMENTO.
			9,7,2011,1011011011	 Need proposed order.
			Petitioner states:	, ,
			On the date of Decedent's death, she had	
Co	nt. from		a claim of ownership to two vehicles, a 1959	
	Aff.Sub.Wit.		Ford Ranchero, and a 1958 Edsel ("the	
✓	Verified		Vehicles"), and a claim of ownership to	
	Inventory		several cars used for parts ("the Parts Cars"),	
	PTC		the title to all of which was held in Decedent's name; Petitioner is not aware of	
	Not.Cred.		any other judicial proceedings to determine	
✓	Notice of		ownership of the Vehicles or the Parts Cars;	
	Hrg		On the date of Decedent's death, the 1959	
✓	Aff.Mail	W/	Ford Ranchero was in the possession of	
	Aff.Pub.		Respondent MILES HUMPHREYS , who is and	
✓	Sp.Ntc.		at all relevant times has been the controlling shareholder, officer and manager of SDS ,	
	Pers.Serv.		INC., exercising complete control and	
	Conf.		dominance of SDS, INC.;	
	Screen		 On the date of Decedent's death, 	
	Letters		Humphreys removed the 1958 Edsel	
	Duties/Supp		automobile from Decedent's driveway,	
	Objections		claiming that the Ford was gifted to him by Decedent in 2007 and the Edsel was gifted	
	Video		to him by Decedent in 2008;	
	Receipt		 Petitioner disputes the alleged gifts as they 	
	CI Report		are inconsistent with statements made by	
	9202		Decedent;	
	Order	Χ	On the date of Decedent's death, the Parts	
	Aff. Posting		Cars were in the possession of the Respondents;	Reviewed by: LEG
	Status Rpt		κουροπαστιώ,	Reviewed on: 6/4/12
	UCCJEA		~Please see additional page~	Updates:
	Citation		- 10 a 0 0 0 a a a a a a a a a a a a a a	Recommendation:
	FTB Notice			File 4 - Sylvester

First Additional Page 4, Wahnie Alec Sylvester

Case No. 11CEPR00350

Petitioner states, continued:

- Petitioner demanded return of the Vehicles and Parts Cars from Respondents, but they have refused to return the Vehicles;
- Humphreys also caused title on the Vehicles to be changed to his name through a purported "lien sale" procedure which Petitioner is informed was an invalid sale, having been conducted without the required and/or proper notice;
- Petitioner alleges Respondents have wrongfully taken, concealed or disposed of the Vehicles which belong to the Estate, and Respondents are liable for double damages for said Vehicles;
- Respondent SDS, INC. has filed an action against Petitioner in Fresno County Case 12CECG00825, claiming Decedent was indebted to SDS, INC. in excess of \$200,000.00 for towing and storage of the Vehicles and Parts Cars. [Note: Creditor's Claim filed 10/5/2011 by SDS, INC. in the amount of \$203,795.00 includes itemizations of storage and towing charges for the Vehicles, including other vehicles, for dates from 11/7/2007 through 7/15/2009.]

Petitioner requests:

- 1. The Court determine that the Decedent was the true owner of the Vehicles;
- 2. The Court direct Miles Humphreys and/or SDS, INC., to transfer the Vehicles and Parts Cars to Petitioner as personal representative of Decedent's Estate; and
- 3. The Court determine that Miles Humphreys and/or SDS, INC. are liable for double damages for the value of such Vehicles and Parts Cars.

Request for Extension of Time for Filing Response to Petition to Establish Estate's Claim of Ownership to Property, for Order Directing its Transfer to Estate and for Double Damages for Wrongful Taking of Estate Property filed 5/23/2012 by Respondents MILES HUMPHREYS and SDS, INC., dba SIERRA TOWING states:

- Respondents request pursuant to Probate Code § 852 an extension of time for preparation for the hearing to file their Response to Petitioner's Petition to Establish Estate's Claim of Ownership to Property for Order Directing its Transfer to Estate and for Double Damages for Wrongful Taking of Estate Property on the following grounds:
 - 1. On 10/5/2011, Respondent SDS, INC. filed its *Creditor's Claim* in the matter entitled Estate of Wahnie Alec Sylvester, Decedent, Sally Mincks as Personal Representative;
 - 2. On 10/18/2011, Respondent SDS, INC. filed its *Request for Special Notice* dated 10/17/2011; copies of the Request for Special Notice were served upon Sally Mincks, c/o Helon & Manfredo; Respondent requests the Court take Judicial Notice of Respondents' *Request for Special Notice*;
 - 3. On 3/12/2012, Respondent SDS, INC dba Sierra Towing, filed a plaintiff its Complaint on Rejected Claim against Sally Mincks, as Personal Representative of the Estate of Wahnie Alec Sylvester (Case #12CECG00825); the action is based upon a rejection of Respondent's Creditor's Claim which states Decedent's estate was indebted to Respondent in the sum of \$203,795.00, representing charges and fees for towing and storage services provided by Respondent, at the request of the Decedent, involving allegedly the same vehicles as set forth in the Petitioner's petition;
 - 4. On 4/20/2012, Defendant Sally Mincks, as Personal Personal Representative of the Estate, served her Answer to the Complaint on Rejected Claim asserting substantially the same allegations as set forth in her petition;

~Please see additional page~

Second Additional Page 4, Wahnie Alec Sylvester Case No. 11CEPR00350

Respondents MILES HUMPHREYS' and SDS, INC., dba SIERRA TOWING'S Request for Extension of Time for Filing Response, continued:

5. On 5/4/2012, Respondent initiated and served its discovery upon Petitioner Sally Mincks, by way of Form Interrogatories and Request for Production of Documents, with said responses purportedly due on about 6/4/2012; assuming the Petitioner responds in the time required to respond and no additional discovery is required, Respondent will not have adequate time to review the discovery responses, investigate the facts, and prepare a response before the hearing date.

Based upon the above, Respondents request the Court continue the hearing for a reasonable time in order for Respondent to prepare and file their Response to the petition.

Kruthers, Heather H. (for Public Guardian – Trustee)

Status Hearing Re: Trustee and Purchase of Van

Age: 21 The JESUS SOTO SPECIAL NEEDS NEEDS/PROBLEMS/COMMENTS: TRUST was established on 4-12-12 DOB: 4-8-91 Note: Mr. Soto was to receive and the approx. \$36,996.25 from a personal **PUBLIC GUARDIAN** was appointed injury settlement. the initial Trustee, and the Order was approved on 5-22-12. Aff.Sub.Wit. Note: The Court will set status Verified The Court set this hearing for status hearings as follows: Inventory of the purchase of the van. **PTC** Friday October 5, 2012 for filing of Not.Cred. the Inventory and Appraisal Status Report filed 5-22-12 states Notice of Clara Soto, the original petitioner Friday October 4, 2013 for filing of Hrg and mother of Jesus Soto, has the first account Aff.Mail assessed her son's needs and Aff.Pub. obtained a detailed sales order from Nor-Cal Mobility regarding a Sp.Ntc. van that would be best for him. The Pers.Serv. van is a 2007 Dodge Caravan with Conf. 37,500 miles on it with a purchase Screen price of \$29,995. A copy of the sales **Letters** order is attached. **Duties/Supp Objections** It is the intent of the Public Guardian Video to purchase the van for Mr. Soto's Receipt use. **CI Report** 9202 Order Aff. Posting Reviewed by: skc **Reviewed on:** 6-1-12 Status Rpt **UCCJEA Updates**: Recommendation: Citation File 5 - Soto **FTB Notice**

Case No. 11CEPR00718

Jack H. Boghosian (Estate)

Case No. 11CEPR01034

- Atty Kruthers, Heather H (for Petitioner Public Administrator)
 Atty Bagdasarian, Gary (for beneficiary California Armenian Home)
- Atty Motsenbocker, Gary (for beneficiary Trinity Home Health Services)
- Atty Poochigian, Mark (for Mike Shahinian)

Petition for Approval of Settlement Agreement

	Telillett for Approval of Selliett	
		NEEDS/PROBLEMS/COMMENTS:
	-	
		Continued to June 18, 2012
Cont. from		per agreement between the parties.
Aff.Sub.Wit.		
Verified		
Inventory		
PTC	=	
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.	7	
Screen		
Letters		
Duties/Supp		
Objections		
Video	7	
Receipt		
CI Report		
9202		
Order		
Aff. Posting	_	Reviewed by: KT
Status Rpt		Reviewed on: 6/1/12
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Boghosian

Atty

Case No. 11CEPR01092

Probate Status Hearing Re: Filing of Receipt for Blocked Account

		NEEDS/PROBLEMS/COMMENTS:
		OFF CALENDAR Description
Cont. from		OFF CALENDAR. Receipt for
Aff.Sub.Wit.		Blocked account filed on 5/7/12.
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of	7	
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202	_	
Order	_	
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 6/1/12
UCCJEA		Updates:
Citation		Recommendation:
ETR Notice		Eilo 7 Eratio

Amador, Catherine A (for Petitioner/Conservator of the Person Joyce F. Biglione) Atty Atty

Helon, Marvin T (Court Appointed Attorrey for Conservatee)

Petition for Attorneys Fees [Probate Code 2640]

	e: 92 years		CATHERINE AMADOR, attorney for	NEEDS/PROBLEMS/COMMENTS:
DC	B: 6/29/1919		Conservator JOYCE F. BIGLIONE , is	
			petitioner.	1 New Love Coffee Constitution
				Need proof of service of the
			JOYCE F. BIGLIONE was appointed	Notice of Hearing on:
Со	nt. from		Conservator of the Person on	a. Faye M. Johnson, conservatee.
	Aff.Sub.Wit.		2/17/2012 and Letters issued on	b. Joyce F. Biglione, Conservator
1	Verified		2/28/12	, ,
Ė	Inventory		Petitioner requests fees in	2. Petitioner requests fees paid from the conservatee's estate.
	PTC		connection with the representation	Conservatorship of the estate
	Not.Cred.		of the Conservator for her petition	was never granted.
1	Notice of		to be appointed as conservator.	
*	Hrg			3. Costs include \$8.80 for mileage.
✓	Aff.Mail	W/	Petitioner asks that she be paid	Local Rule 7.17 considers travel to and from court to be a cost of
	Aff.Pub.		from the conservatorship estate for	doing business and therefore not
	Sp.Ntc.		26 hours @ \$265.00 to \$295.00 per	reimbursable.
	Pers.Serv.		hour for a total of \$6,897.50.	4. Need order.
	Conf.			i. Nood oldol.
	Screen		Petitioner further requests that she	
	Letters		be reimbursed costs in the amount	
	Duties/Supp		of \$686.30 for filing fees, service of	
	Objections		process and mileage.	
	Video			
	Receipt		Services are itemized by date and	
	CI Report		include review of documents, visits	
	9202		with client, and court appearances.	
	Order	Χ	аррешинсез.	
	Aff. Posting		Petitioner requests that she be paid	Reviewed by: KT
	Status Rpt		from the conservatee's estate.	Reviewed on: 6/4/12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 8A - Johansen

8A

8B Faye M. Johansen (CONS/PE) Case No. 11CEPR01122

Atty Amador, Catherine A (for Conservator of the Person Joyce F. Biglione)
Atty Helon, Marvin T (Petitioner Court Appointed Attorrey for Conservatee)

Petition for Allowance of Fees to Attorney for Conservatee [Prob. C. 1470 & 1471]

_	e: 92 years		MARVIN T. HELON, petitioner was	NEEDS/PROBLEMS/COMMENTS:
DOB: 6/29/1919			Court appointed to represent the	
			Conservatee on 12/29/11.	
			JOYCE F. BIGLIONE was appointed	
	ont. from		Conservator of the Person on	
	Aff.Sub.Wit.		2/17/12 and Letters issued on	
-	Verified		2/28/12.	
Ě			Detitioner requests food in	
	Inventory PTC		Petitioner requests fees in connection with the representation	
	Not.Cred.		of the Conservatee for JOYCE F.	
	Notice of		BIGLIONE'S petition to appoint a	
✓	Hrg		conservator.	
✓	Aff.Mail	W/		
	Aff.Pub.		Petitioner asks that he be paid from	
	Sp.Ntc.		the conservatorship estate for 20.78	
	Pers.Serv.		hours @ \$250.00 per hour for a total	
	Conf.		of \$5,195.00.	
	Screen			
	Letters		Services are itemized by date and	
	Duties/Supp		include review of documents, visits with client, and court	
	Objections		appearances.	
	Video Receipt			
	Cl Report		Petitioner requests that he be paid	
	9202		from the conservatee's resources	
√	Order		and funds.	
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 6/4/12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 8B - Johansen

Roberta E. Davis Living Trust

Case No. 12CEPR00363

Franco, Paul C. (for James Douglas Davis – Co-Trustee and Beneficiary – Petitioner)

Camenson, David M. (for Carla Ray – Co-Trustee and Beneficary – Respondent)

Petition for Accounting, Removal of Co-Trustee and Instructions [Prob. C. 17200(b) (5)(6), (7), (10) & (12)] Atty Atty

CARLA D. RAY, Co-Trustee and Beneficiary (sister of	
Petitioner), is Respondent.	
Aff.Sub.Wit. Petitioner states he and his sister are all of the beneficiaries of the trust and are the first successor Co-Trustees.	
Inventory	
Notice of Hrg 17200(b)(7)(C) – Compelling Carla D. Ray to account and report to Petitioner as beneficiary. Petitioner, through prior counsel, made a written request on 1-10-12 to provide an	
Aff.Mail w account, but she has failed and refused to provide any such account or report. It has now been more than 40 days since that request.	
Pers.Serv. 17200(b)(10) - For the removal of Carla D. Ray as Co-	
Screen	
Video terms of the trust, and failed to cooperate with Petitioner in administration of the trust.	
CI Report 17200(b)(5) – for a determination of the debts owed by	
Order X Aff. Posting Status Rpt Carla D. Ray to the trust. Prior and subsequent to their mother's death, she charged expenses, including but not limited to four Dell computers and a 42" LCD HDTV to their mother's estate. The latest charges on 8-23-12 for \$93.24, Reviewed by: sl	
UCCJEA over two months after their mother passed. Despite several demands to explain and pay, she has failed and refused. Citation Recommendation of the commendation	on:
FTB Notice 17200(b)(12) – Compelling Carla D. Ray to pay the Dell Computer invoice in the amount of \$2,693.37 and reimburse the trust for any other charges or expenses owed to the trust.	
17200(b)(6) – Instructing that the purpose of the trust has been concluded and it shall be brought to a close, and that the trustee is to conclude the administration of the estate and distribute proceeds of the trust to beneficiaries pursuant to the terms of the trust, including but not limited to the share of the State Farm check, and that Carla D. Ray cooperate with Petitioner as Co-Trustee in administration if she is not removed.	
SEE PAGE 2	

9 Roberta E. Davis Living Trust

Petitioner prays for an Order:

- 1. Compelling Carla D. Ray to account fully for all trust property and report all actions taken;
- 2. Removing Carla D. Ray as trustee;
- 3. Appointing James Douglas Davis as sole trustee;
- 4. Instructing the trustee that Carla D. Ray owes the trust the amount of \$2,693.37 for the Dell computer account and that said amount shall be charged against and paid by her share of the trust proceeds;

Case No. 12CEPR00363

- 5. Instructing the trustee to distribute all known assets of the trust to the named beneficiaries according to the terms of the trust and bring the trust to conclusion;
- 6. For costs herein; and
- 7. For such other orders as the court may deem proper.

Response filed 5-29-12 by Carla Ray states:

Respondent did not receive a written request from Petitioner or an attorney or anyone else requesting an accounting of any sort. It is noteworthy that Petitioner did not attach such request as an exhibit along with his other exhibits do to the simple fact that one does not exist. Section 16062(a) provides that a trustee generally has a duty to account at least annually to a beneficiary. Decedent died on 6-13-11, less than one year ago. Based on the above, Petitioner is premature in his petition to remove Respondent as co-trustee for failure to account. Respondent would have provided an accounting in the ordinary course – with the help of Petitioner as co-trustee – after 6-13-12, but has instead provided the attached accounting – without his help – for the period 6-13-11 through 5-25-12.

Second, before a distribution can be accomplished, the final bills of the decedent must be satisfied. Attached are invoices for unpaid bills. In addition, the trustee has incurred the expense of \$250.00 to Ed Huff, CPA, for tax preparation and \$2,740 to David M. Camenson, Professional Corporation, for legal services after the decedent's death. Also, a court filing fee of \$395.00 for this response was incurred after the date of the accounting. Petitioner has demanded that he is owed half of the \$38,883.82 death benefit from State Farm before satisfying these debts of the estate. This request should be denied.

Third, before final distribution can occur, an account of interim distributions must be prepared so that the final distribution can be equal as required by the trust. Based on the values of the accounting, Petitioner has already received 2/3 of the value of the trust estate (\$96,000) while Respondent has received only \$45,020.

Fourth, contrary to the allegation by Petitioner, Respondent has provided as much information at her disposal to address any inquiries from Petitioner at all times. At times, the information was not available. This can hardly be considered to be failing to cooperate.

Fifth, Petitioner is well aware of the fact that Respondent was not responsible for any charges made to a Dell credit card. The decedent opened a credit card without Respondent's knowledge for use by Misty Blackmon, the decedent's granddaughter, and the balance was paid in full on 5-14-12 by Misty Blackmon from her own money, not from any trust estate monies.

Respondent prays for an Order:

- 1. Denying and dismissing the petition, Petiitoner's request for an accounting and the removal of Respondent as Co-Trustee;
- 2. Instructing Petitioner as Co-Trustee to cooperate with Respondent to obtain updated appraisals on the jewelry in theh possession of Petitioner so as to correctly value the assets already distributed to him;
- 3. Instructing the Trustees to pay all bills of the trust estate as set forth in Exhibit B to the extent required by the respective creditors;
- 4. Distribute the balance of the trust estate such that both Petitioner and Respondent receive a distribution of equal value:
- 5. For costs herein; and
- 6. For such other orders as the court may deem proper.

Milnes, Michael A (for Louise Tabor – Administrator – Petitioner)

Petition for Probate of Will and for Letters Testamentary; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DOD: 03/05/2012			LOUISE TABOR, wife of Gary Tabor	NEEDS/PROBLEMS/COMMENTS:
			beneficiary is Petitioner and requests appointment as Administrator with Will Annexed without bond.	Original Will was attached to Petition. Probate Code 8200 requires a <u>COPY</u> to be attached.
Co	nt. from			
_	Aff.Sub.Wit.	s/p	E HIAGA . I	
✓	Verified		Full IAEA- o.k.	Note: If the petition is granted status hearings will be set as follows:
	Inventory			
	PTC			• Friday, 11/09/2012 at
	Not.Cred.		Will dated: 11/14/2006	9:00a.m. in Dept. 303 for the
✓	Notice of Hrg	W		filing of the inventory and appraisal and
✓	Aff.Mail			• Friday, 08/10/2013 at
√	Aff.Pub.		Residence: Fresno	9:00a.m. in Dept . 303 for the
	Sp.Ntc.		Publication: The Business Journal	filing of the first account and
	Pers.Serv.			final distribution.
	Conf.			Pursuant to Local Rule 7.5 if the
	Screen Letters	· · ·		required documents are filed 10
H		Х		days prior to the hearings on the
✓	Duties/Supp		Estimated value of the Estate:	matter the status hearing will come
	Objections		Personal Property - \$887,000.00	off calendar and no appearance
	Video		Real Property - \$160,000.00 Total: - \$1,047,000.00	will be required.
	Receipt		- \$1,047,000.00	·
_	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT/LV
	Status Rpt		Probate Referee: Steven Diebert	Reviewed on: 06/04/2012
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 10 - Garrison
				10

Atty

Cobb, Lee S.W. (for Petitioner Martha O. Diaz Gaitan) Spousal Property Petition (Prob. C. 13650)

DOD: 8/26/2011 NEEDS/PROBLEMS/COMMENTS: MARTHA O. DIAZ GAITAN, Surviving spouse, is petitioner. Continued to 7/11/12 at the 40 days since DOD. request of the Attorney. Cont. from No other proceedings. Aff.Sub.Wit. 1. Need proof of service of the Verified Notice of Hearing or Declaration Will dated: 5/10/2011 devises of Due Diligence on: entire estate to Martha O. Diaz, Inventory a. Nelda Gaitan, dauahter surviving spouse. PTC b. Ramirio Gaitan, son Not.Cred. Notice of **Petitioner requests** court Hrg confirmation that the real property W/ Aff.Mail located at 7314 S. Cherry Avenue Aff.Pub. and the 1965 Chevy Impala passes Sp.Ntc. to her pursuant to Decedent's Will. Pers.Serv. Conf. Screen Letters Duties/Supp **Objections** Video Receipt **CI Report** 9202 Order Aff. Posting Reviewed by: KT Status Rpt Reviewed on: 6/4/12 **UCCJEA Updates:** Citation Recommendation: File 11 - Gaitan **FTB Notice**

Case No. 12CEPR00384

Petition to Determine Succession to Real and Personal Property (Prob. C. 13151)

			Time specession to keen and reisonal	
DOD: 5/16/2011			HOWARD GATLIN, Trustee of the	NEEDS/PROBLEMS/COMMENTS:
			Gatlin Family Trust dated 6/3/1998,	
			is petitioner.	
			10 -1	Note: Declaration of Petitioner states
Co	nt. from	1	40 days since DOD	the first sentence of paragraph 4 of
	Aff.Sub.Wit.		No other propositions	decedent's will devises the entire
✓	Verified		No other proceedings	residue of her estate to the trustee of the Gatlin Family Trust, dated
	Inventory		I & A - 148,165.60	February 12, 1998. Petitioner states
-	PTC		N	they did not execute a trust on
	Not.Cred.		Will dated: 6/3/1998 – devises	2/12/1998, nor did they execute any wills on that day or any other
✓	Notice of		the entire estate to the Gatlin	documents. The Will is in error. The
	Hrg	\ \ \ / /	Family Trust dated 2/12/1998.	only trust petitioner and his wife
✓	Aff.Mail	W/		[decedent] ever executed is the
	Aff.Pub.			trust know as the Gatlin Family Trust
	Sp.Ntc.			dated 6/3/1998.
	Pers.Serv.		Petitioner requests Court	
	Conf.		determination that	
	Screen		decedent's 8.33% interest in a	
	Letters		tractor, 7 parcels of real	
	Duties/Supp		property located in Mariposa	
	Objections		County and 1/12 interest in	
	Video		,	
	Receipt		real property in Mariposa	
	CI Report		County pass to Howard Gatlin	
	9202		as Trustee of the Gatlin Family	
√	Order		Trust, dated 6/3/1998 pursuant	
	Aff. Posting		to decedent's will.	Reviewed by: KT
	Status Rpt			Reviewed on: 6/4/12
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 12 - Gatlin

Smith, Jane T. (for Public Guardian – Petitioner)

Petition for Appointment of Temporary Guardianship of the Person (Prob. C. 2250)

Age	e: 90		TEMPORARY GRANTED EX PARTE EXPIRES 6-7-12	NEEDS/PROBLEMS/
	B: 7-2-21			COMMENTS:
			GENERAL HEARING 7-5-12	Court Investigator advised
			PUBLIC GUARDIAN is Petitioner and requests	rights on 5-29-12
			appointment as Temporary Conservator of the	1 November 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1
	Aff.Sub.Wit.		Person and Estate.	Need proof of personal service of Notice of
~	Verified			Hearing with a copy of
	Inventory		Estimated Value of Estate:	the Temporary Petition
	PTC		Personal property: \$692.573.64 Annual income: \$57,222.24	on the proposed Conservatee, Ms. Merk,
	Not.Cred.		Total: \$749,795.88	per Probate Code
~	Notice of		¥ ,	§2250(e).
	Hrg		Petitioner states Ms. Merk was admitted to Clovis	2. Petitioner lists only one
>	Aff.Mail	W	Community Medical Center for pneumonia in February 2012, was treated with antibiotics, and	relative for Ms. Merk
	Aff.Pub.		discharged. She was readmitted on March 1, 2012,	– a brother in Arizona –
	Sp.Ntc.		and remains hospitalized for failure to thrive and	however; the Court Investigator's report
	Pers.Serv.	Χ	physical function decline.	states the case was
	Conf.		Ada Adaykia nan gunahulatan caral dan aradan terrel	referred to the Public
	Screen		Ms. Merk is non-ambulatory and dependent for all activities of daily living, is diagnosed with dementia,	Guardian by Laura Berry, Ms. Merk's niece,
	Letters		and suffers impairment to short term memory and	and also states that Ms.
	Duties/Supp		immediate recall. Hospital records describe her as	Merk indicated that
	Objections		very confused.	Stanley Merk, her brother-in- law, helps
	Video		Although the had 24 hour ears at her home has	with her finances.
	Receipt	<u> </u>	Although she had 24-hour care at her home, her health was not good under that supervision, and	Therefore need
~	CI Report	<u> </u>	hospital staff expressed concern about the care	Therefore, need clarification as to the
	9202		providers that were with her at the hospital. Given	list of relatives, and
	Order		her condition both times, Petitioner asserts that it is	need proof of service of
			not in Ms. Merk's best interest to return home at this time.	Notice of Hearing at least five (5) court days
			initio.	prior to the temporary
			Due to her diagnosis of dementia, she is unable to	hearing with a copy of
			provide for her basic needs of food, clothing and	the temporary petition per Probate Code
			shelter, and is unable to manage her financial affairs.	§2250(e) on <u>Laura Berry</u>
			No family or friends are willing and/or able to act as her conservator. Temporary conservatorship would	and any other relatives
			enable Public Guardian to secure placement,	that may have been omitted from notice.
			protect her estate from further depletion, and secure	311111011101100
	Aff. Posting		her home, bank accounts and pay outstanding bills.	Reviewed by: skc
	Status Rpt		The hospital wants to release her as soon as possible,	Reviewed on: 6-4-12
	UCCJEA		and Ms. Merk is currently on private pay status.	Updates:
	Citation		Court Investigator Jennifer Daniel filed a report on 5-	Recommendation:
	FTB Notice		30-12.	File 13 - Merk

14 Shawn Tyler Allen (GUARD/P)

Case No. 05CEPR00148

Atty Goodwin, Miriam E. (pro per Guardian/maternal grandmother)

Atty Allen, David (pro per Petitioner/father)

Petition for Visitation

Age: 9 years			DAVID ALLEN , father, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
DOB: 4/29/2003				
			MIRIAM GOODWIN, maternal	1. Need Notice of Hearing.
			grandmother, was appointed	2. Need proof of service of the
			guardian on 7/11/2005.	Notice of Hearing along with a
Со	Cont. from		Mother: ERIKA GOODWIN	copy of the Petition on:
	Aff.Sub.Wit.		Momer. ERIKA GOODWIN	a. Miriam Goodwin, maternal
✓	Verified		Petitioner states he has recently	grandmother/guardian b. Erika Goodwin, mother
	Inventory		been released from prison (3/27/12).	b. Lika Goddwiii, moinei
	PTC		Father states he currently lives in a	
	Not.Cred.		program for men and has weekend	
	Notice of	Χ	passes. He would like to request	
	Hrg		that he be allowed to visit his son	
	Aff.Mail	Χ	every other Sunday in order to take	Note to Judge: There is no order in
	Aff.Pub.		him to parks, ball games and to	the file. If the court makes a
	Sp.Ntc.		spend quality time with him. Any time he spends with his son his	visitation order it can be reflected on
	Pers.Serv.		attitude and grades improve	the minute order.
	Conf.		dramatically.	
	Screen			
	Letters			
	Duties/Supp		Note: Current visitation order, per	
	Objections		minute order dated 10/19/2010:	
	Video			
	Receipt		Mom has unsupervised visits every	
	CI Report		other Saturday from 10:00 a.m. to	
	9202		4:00 p.m.	
	Order	Χ		Davison dlam KT
	Aff. Posting			Reviewed by: KT
\vdash	Status Rpt UCCJEA			Reviewed on: 6/4/12 Updates:
	Citation			Recommendation:
	FTB Notice			File 14 - Allen
	TID HONCE			14

15 Donnie De'monty Marquise Maiden, Jr (GUARD/P) Case No. 11CEPR01109 Atty

Williams, Phyllis Louise (pro per Petitioner/paternal grandmother)

Schacher, Kara (for Objector/father Donnie Maiden, Sr.)

Atty

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 3 years DOB: 6/19/08			Temporary Expires 6/7/12	NEEDS/PROBLEMS/COMMENTS:
			PHYLLIS LOUISE WILLIAMS, paternal grandmother, is Petitioner. Father: DONNIE DE'MONTY MARQUISE	Objections are brought by Latasha Fradue on behalf of the father, Donnie Maiden, Sr. via a Power of Attorney.
Cont. from 022312, 042612			MAIDEN – incarcerated in Phoenix, AZ – served by mail on 3/27/12.	The Power of Attorney attached to the objections
	Aff.Sub.Wit.			gives Latasha Fradue
1	Verified		Mother: FELICIA RAMIREZ – Court	temporary custody of
	Inventory		dispensed with notice by minute order dated 2/23/12.	Donnie Maiden's son, Donnie Maiden, Jr. The POA
	PTC		dalea 2/23/12.	does not appear to give Ms.
	Not.Cred.		Paternal Grandfather: Donnie Maiden	Fradue authority to file
1	Notice of		Maternal Grandfather: Unknown	objections on behalf of the
Ŀ	Hrg	14//	Maternal Grandmother: Unknown	father Donnie Maiden, Sr.
/	Aff.Mail	W/	Petitioner states the father had sole	
	Aff.Pub.		custody of the minor. Father is now	
	Sp.Ntc.		incarcerated and is unable to care for the	
	Pers.Serv.		minor. Petitioner states she has been	
/	Conf. Screen		actively involved in the minor's life since birth. A guardianship is necessary so that	
1	Letters		the Petitioner can provide the minor with	
<u>√</u>	Duties/Supp		the proper care and support.	
 			Ohio aliano af Dannia Maidan Su filad ha	
	Objections		Objections of Donnie Maiden, Sr. filed by Latasha Purdue on behalf of Donnie	
	Video Receipt		Maiden, Sr. via Power of Attorney on	
/	CI Report		4/25/12. Objections state Phyllis Williams	
ľ	9202		was not involved in Donnie Maiden, Sr.'s	
/	Order		upbringing, has past issues with drugs use and is not the party Mr. Maiden wants	
	Aff. Posting		caring for his son. Mr. Maiden has known	Reviewed by: KT
	Status Rpt		Latasha Fradue since childhood and they	Reviewed on:
1	UCCJEA		lived together since July 2010. She and	Updates:
	Citation		Donnie Jr. have a very close relationship as she has known him since birth. Latasha	Recommendation:
	FTB Notice		Fradue is the person Mr. Maiden wants	File 15 - Maiden
			caring for his son.	
			Court Investigator JoAnn Morris' Report filed on 4/11/12.	
				1 =

16 Bradley William Rogers (GUARD/P)

Case No. 12CEPR00311

Atty Rogers, Sarita Jean (pro per Petitioner/maternal cousin)
Atty Rogers, Bruce A Sr (pro per Petitioner/maternal cousin)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age: 2 months **NEEDS/PROBLEMS/COMMENTS: TEMPORARY EXPIRES 6/7/12** DOB: 3/22/12 1. Need Notice of Hearing. BRUCE ROGERS and SARITA ROGERS. maternal cousins, are petitioners. 2. Need proof of personal service of the Notice of Hearing along Father: UNKNOWN Cont. from with a copy of the petition or Aff.Sub.Wit. Consent and Waiver of Notice Mother: CHRISTINA MORROW or Declaration of Due Diligence Verified on: Inventory Paternal grandparents: unknown a. Christina Morrow (mother) **PTC** Maternal grandfather: Jon Carson Maternal grandmother: Violet Morrow 3. Need proof of service of the Not.Cred. Notice of Hearing along with a Notice of copy of the Petition or Consent Petitioners state mom is diagnosed as Hrg and Waiver of Notice or severely mentally retarded and has Aff.Mail Declaration of Due Diligence cerebral palsy. She is currently under Aff.Pub. on: a conservatorship of her person. Sp.Ntc. a. Jon Carson (maternal Mom is completely incapable of grandfather) Χ Pers.Serv. taking proper care of the minor. The b. Violet Morrow (maternal Conf. minor has been residing with the grandmother) Screen petitioners since birth. **Letters** Court Investigator Jennifer Young's Duties/Supp Report filed on 5/31/12. **Objections** Video Receipt **CI Report** 9202 Order Aff. Posting Reviewed by: KT Reviewed on: 6/5/12 Status Rpt **UCCJEA Updates:** Citation **Recommendation: FTB Notice** File 16 - Rogers

17 Isaac Verdot (GUARD/P)

Case No. 12CEPR00478

Atty Verdot, Glen E Jr. (pro per Petitioner/ Paternal grandfather)

Atty Verdot, Ethel (pro per Petitioner/Paternal grandmother)

Petition for Appointment of Temporary Guardian of the Person (Prob. C. 2250)

Age: 1 year DOB: 6/4/2011 Cont. from Aff.Sub.Wit. Verified Inventory **PTC** Not.Cred. Notice of Χ Hrg Aff.Mail Aff.Pub. Sp.Ntc. Pers.Serv. Χ Conf. Screen Letters **Duties/Supp Objections** Video Receipt CI Report 9202 Order Aff. Posting **Status Rpt UCCJEA** Citation **FTB Notice**

GENERAL HEARING 8/9/12

GLEN VERDOT, Jr. paternal grandfather and **ETHEL VERDOT,** paternal grandmother, are petitioners.

Father: GLEN VERDOT, III

Mother: GUADALUPE VALENCIA

Maternal grandfather: not listed Maternal grandmother: Sylvia Morales

Petitioners state the minor needs a guardian because both parents are under the influence of narcotics.

They try to take the minor while they are using. Petitioners state they are afraid for the minor's safety.

NEEDS/PROBLEMS/COMMENTS:

- 1. Need Notice of Hearing.
- Need proof of personal service of the Notice of Hearing along with a copy of the Temporary Petition or Consent and Waiver of Notice or Declaration of Due Diligence on:
 - a. Glen Verdot, III (father)
 - b. Guadalupe Valencia (mother)
- 3. Petitioner Glen Verdot, Jr.'s Confidential Screening form indicates that either he or another person living in his home has a social worker, parole or probation officer assigned to him or her without explaining.
- 4. Petitioner Ethel Verdot's Confidential Screening form indicates that either she or another person living in her home has a social worker, parole or probation officer assigned to him or her without explaining.

Reviewed by: KT
Reviewed on: 6/5/12
Updates:
Recommendation:
File 17 - Verdot

Knapp, Bonnie J (Glendale, CA - for Special Administrator, Eric Schloen)

Petition for Termination of Further Proceedings and Discharge of the Personal Representative

DOD: 8/26/2011			ERIC SCHLOEN, petitioner, was	NEEDS/PROBLEMS/COMMENTS:
7-1 5/-5/-51			appointed Special Administrator	,
			without bond. Letters	
			expired11/8/2011.	
Cont. from				
	Aff.Sub.Wit.		Petitioner was appointed Special	
1	Verified		Administrator for the limited purpose of obtaining Medi-Cal	
H	Inventory		benefits for the decedent to settle	
	PTC		medical bills incurred by decedent	
	Not.Cred.		prior to his death. Petitioner is an	
✓	Notice of		agent of hospital where decedent	
	Hrg		died.	
✓	Aff.Mail	W/	I & A - waived per	
	Aff.Pub.		order appointing special	
	Sp.Ntc.		administrator.	
	Pers.Serv.			
	Conf.		Petitioner states he performed all	
	Screen		duties necessary as special	
	Letters		administrator as he obtained	
	Duties/Supp		health benefits for the decedent,	
	Objections		the estate has no assets and there	
	Video		is no longer a need for a special administrator.	
	Receipt		daministrator.	
	CI Report		Petitioner Prays for an Order:	
	9202		1) Terminating the administration	
✓	Order		of the estate and discharging	
	Aff. Posting		the Special Administrator.	Reviewed by: KT
	Status Rpt			Reviewed on: 6/4/12
	UCCJEA			Updates:
	Citation			Recommendation: SUBMITTED
	FTB Notice			File 18 - Jackson

19 Maria Evelyn Rivera Andasol Case No. 11CEPR01110

Atty Farah, Nadia (for Flor Morena Alfaro Larreynaga – Guardian) Farah, Nadia (for Maria Evelyn Rivera Andasol – ward/Petitioner) Atty

Motion to Sign Proposed Order Appointing Guardian

Age: 18 MARIA EVELYN RIVERA ANDASOL, ward, is Petitioner. **NEEDS/PROBLEMS/COMMENTS:** DOB: 02/18/94 1. Need **Notice of Hearing** FLOR MORENA ALFARO LARREYNAGA, sister, was and proof of service appointed as Guardian on 02/15/12, Judicial with 5 days notice on all Council form GC-240 (Order Appointing Guardian interested parties. of Minor) was signed on 02/15/12 and Letters were Cont. from issued on 02/24/12. Aff.Sub.Wit. Verified A Petition to extend the Court's jurisdiction over the minor until her nineteenth birthday permitting Inventory minor's ongoing eligibility to apply for special **PTC** immigrant juvenile status was granted on 02/12/12. Not.Cred. Notice of On 05/31/12, the Court set this matter for hearing on Hrg Petitioner's Motion to Sign Proposed Order Aff.Mail Х Appointing Guardian was set for hearing on Aff.Pub. 06/07/12. Sp.Ntc. Petitioner states that a proposed Order was lodged Pers.Serv. with the Court at the February 15, 2012 hearing, but Conf. the Order was not signed. The Immigration and Screen Nationality Act as amended by the Trafficking Letters Victims Protection Reauthorization Act of 2008 **Duties/Supp** allows minor Maria Evelyn Rivera Andasol to seek **Objections** relief under the Special Immigrant Juvenile Status Video ("SIJS") because she is under 21 and unmarried; she Receipt is legally committed to the custody of an individual appointed by a State Court that has jurisdiction over **CI Report** her; reunification with one or both parents is not 9202 viable due to abuse, abandonment or neglect by Order one or both parents; and it was determined that it Aff. Posting Reviewed by: JF would be in Maria's best interest not to return to her Status Rpt **Reviewed on:** 06/04/12 country of nationality or last habitual residence. The **UCCJEA Updates:** proposed order previously submitted alleged these Citation **Recommendation:** very facts and is necessary to complete Maria's FTB Notice File 19 - Andasol relief requested under SIJS. Without such confirmation of the underlying fats, Maria will not qualify for immigration relief and may face removal to El Salvador. Petitioner states that no new findings of law or facts are requested here; all that is needed is for the Court to confirm the findings previously reached. Petitioner requests that this Court issue the Order confirming that it made the requisite findings of fact, in granting the guardianship that will permit her to petition the US Citizenship and Immigration Service for Special Immigrant Juvenile Status.